

CRM & WEB SPECIALISTS



C2



**Microsoft Dynamics®
CRM 2013**



Microsoft Dynamics™

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INTRODUCING MICROSOFT DYNAMICS CRM 2013

CRM Re-imagined

The way people buy has fundamentally changed. Today's customer is constantly connected via their mobile device, is plugged into social networks, and does their own research to solve their problems.

Therefore, it is no surprise to find that customers are almost 60 percent down a sales cycle before they actually make contact with the company that they are researching. Your customer relationship management (CRM) system should enable your people to excel in this new world. CRM systems built for a traditional sales cycle are outdated—they are static and not able to help you in a dynamic way. And that is why, with Microsoft Dynamics CRM 2013, we are creating something entirely new.

Drive toward success

We understand the importance of driving toward an outcome, which is why business processes are a significant component of our new user experience. Completely configurable process guidance takes the "guess" out of "work," driving each individual and your entire organization toward success. It's a roadmap—from where you are now to where you need to go to reach your ultimate goal. And it helps reduce the demands of on-boarding so you can pull new hires from the sidelines and onto the field of play.

Help your sales teams stay connected

Keep your sales teams connected. Foster productive internal and external communities by enabling your people to share news, information, and best practices. Embedded Yammer and powerful file-sharing capabilities enable you to collaborate with your team in the context of the work at hand.

That way, your mobile sales reps continue to "work the deal" while on the road. Your field salespeople can arrive prepared for every meeting by accessing schedules and communications via the phones and tablets they choose to use. And, with access to real-time customer and partner information, they can deliver more impactful engagements.

Use insights to make interactions personal

Take your account and contact information from static to dynamic by providing relevant insights through real-time account data, news, social activity, and connection information. Use integrated sales intelligence and social media to target profitable opportunities and to have more relevant sales conversations.

Give your sales managers and executives increased visibility into business health using rich inline visualizations and real-time dashboards.



Microsoft Dynamics CRM – CRM Re-imagined:

<http://www.microsoft.com/en-us/dynamics/crm-sales.aspx>

NEW USER INTERFACE

The new Microsoft Dynamics CRM has a cleaner, faster and more intuitive user interface, all to drive your productivity. New form layouts and interface, designed to make better use of screen real estate and provide a fast usable experience across devices and browsers.

With an entirely new user experience, Microsoft Dynamics CRM allows you to view everything you need in one spot - fast, fluid, and relevant to the work at hand. No pop-up windows. No flipping from one application to the next. Information at your fingertips gives you the insights you need to get in, get going, and get done, so you can focus on what is most important - your customers.

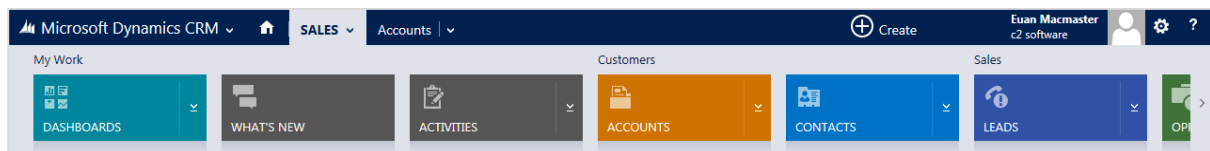
Key additions include:

- Simplified data input with quick create forms, optimised only to gather the key information for the record
- Improved ease of use with removal of pop-ups
- Inline editable grids allow the quick addition of line items e.g. invoice lines. Also includes inline lookup and editing
- Associate images with records e.g. Contact. New image attribute type allows this to be added to existing and custom entities
- Quick view forms surfaces information from related records, without the need to drill into the related record

It's all about efficiency

The new CRM form with productivity in mind by presenting key business data and related activities in a style that maps to the way that people actually work.

The **new user experience** organizes information in a clean, consistent and easy-to-access manner. By giving you all the information you need at one time, you don't get distracted and you stay on task. The **streamlined navigation** experience drops down from the top of the screen with a single touch:



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SALES | SERVICE | MARKETING | SETTINGS | HELP

Sales Pipeline

My Open Opportunities

Stage	Value (£)
1-Qualify	25,000.00
2-Develop	55,000.00
3-Propose	36,000.00

what's new

POST

All records | Both | Auto posts | User posts

- Operating manual required (sample)**
Case: Closed by Euan Macmaster for Account A. Datum Corporation (sample).
On Operating manual required (sample)'s wall
Today
- Product catalog requested (sample)**
Case: Closed by Euan Macmaster for Account Fourth Coffee (sample).
On Product catalog requested (sample)'s wall
Today
- Product damaged (sample)**
Case: Closed by Euan Macmaster for Account Litware, Inc. (sample).
On Product damaged (sample)'s wall
Today
- Product information required (sample)**
Case: Closed by Euan Macmaster for Account Coho Winery (sample).
On Product information required (sample)'s wall
Today
- Product question (sample)**
Case: Closed by Euan Macmaster for Contact Jim Glynn (sample).
On Product question (sample)'s wall
Today
- Product service time (sample)**
Case: Closed by Euan Macmaster for Account Fabrikam, Inc. (sample).
On Product service time (sample)'s wall
Today

0 followers
Start following colleagues and records, and let people follow you.
[Learn more](#)

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SAVE AS | NEW | REFRESH ALL | ADVANCED FIND

Sales Activity Social Dashboard

Leads by Source

My Open Leads

Source	Count
Advertisement	3
Trade Show	3
Web	4

Top Opportunities

My Open Opportunities

Topic	Est. Revenue
6 orders of Product...	~10,000
Will be ordering ab...	~20,000
Needs to restock th...	~20,000
They sell many of t...	~20,000
Very likely will or...	~25,000

Top Customers

My Closed Opportunities in Current Fiscal Year

Potential Customer	Sum (Est. Revenue) (£)
Adventure Work...	~100,000

My Activities

Search for records

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Task	Schedule an appointment with customer	Maintena...	High	1/17/2014 10:00 AM	1/17/2014 10:00 AM
Task	Evaluation Plan agreed upon		Normal	1/18/2014 10:00 AM	1/18/2014 10:00 AM

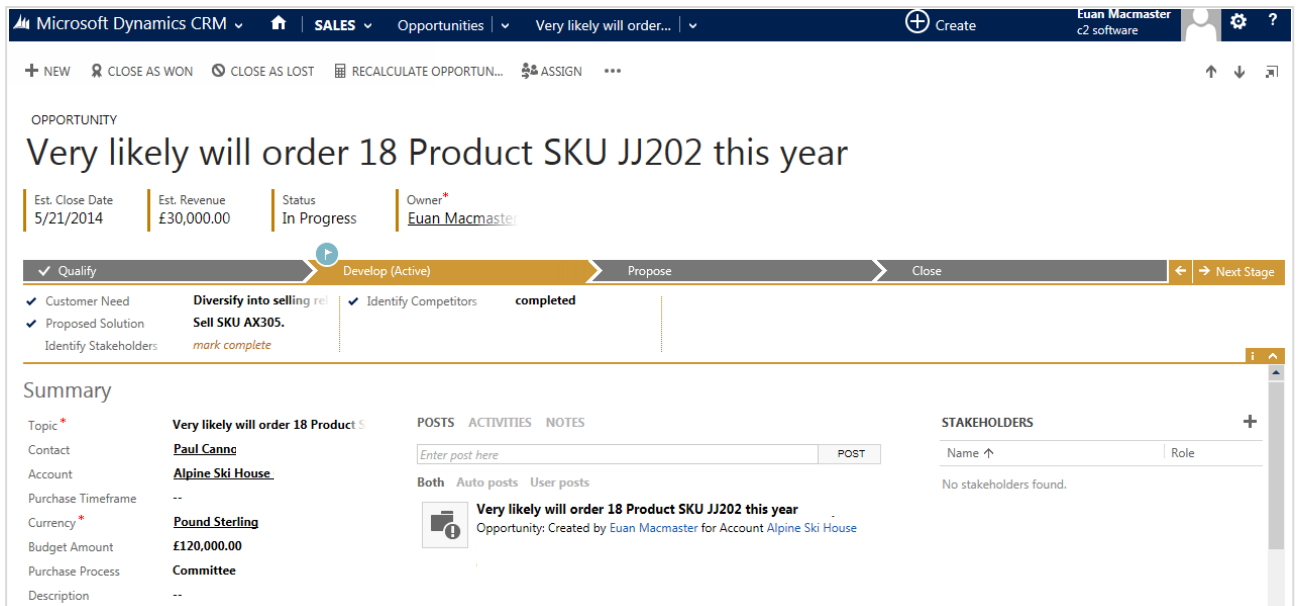
Getting Started with Microsoft Dynamics CRM Video:

<http://bit.ly/1b0yaKh>

PROCESS GUIDANCE

The new Process Flow facility allows organisations to define clear guidance and outcomes to drive business goals and efficiency. No more guessing what to do next. Process guidance, based on industry-leading best practices, helps your sales team easily move from lead to close - faster than ever before. Flexible and configurable, it gives your organization the ability to be agile in the face of change.

- Guided processes can now be applied to any entity
- Where in the process is this record? Process guide shows the user clearly where they are in the process
- What needs to happen in order to move on? What mandatory or advisory fields should be completed to move on in the process
- Configurable processes per entity that requires no programming skills. Processes can be adapted as the business requirements change
- Support process flows across entities e.g. Lead, Opportunity, Contact, Account
- Allows users to work toward a business goal or outcome
- Multiple processes can be supported per entity and a record can be switched between processes as required e.g. fast-track



The screenshot displays the Microsoft Dynamics CRM 2013 interface for a sales opportunity. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Opportunities', and the record title 'Very likely will order...'. The main header shows the opportunity title 'Very likely will order 18 Product SKU JJ202 this year' with key details: Est. Close Date (5/21/2014), Est. Revenue (£30,000.00), Status (In Progress), and Owner (Euan Macmaster).

A process flow is visible below the header, showing stages: Qualify, Develop (Active), Propose, and Close. The 'Develop (Active)' stage is expanded to show tasks: 'Customer Need' (Diversify into selling rel), 'Proposed Solution' (Sell SKU AX305), and 'Identify Stakeholders' (mark complete). A 'completed' status is shown for 'Identify Competitors'.

The 'Summary' section on the left lists fields: Topic (Very likely will order 18 Product...), Contact (Paul Canne), Account (Alpine Ski House), Purchase Timeframe (--), Currency (Pound Sterling), Budget Amount (£120,000.00), Purchase Process (Committee), and Description (--).

The 'POSTS' section shows a post titled 'Very likely will order 18 Product SKU JJ202 this year' with the text 'Opportunity: Created by Euan Macmaster for Account Alpine Ski House'.

The 'STAKEHOLDERS' section is currently empty, displaying 'No stakeholders found.'

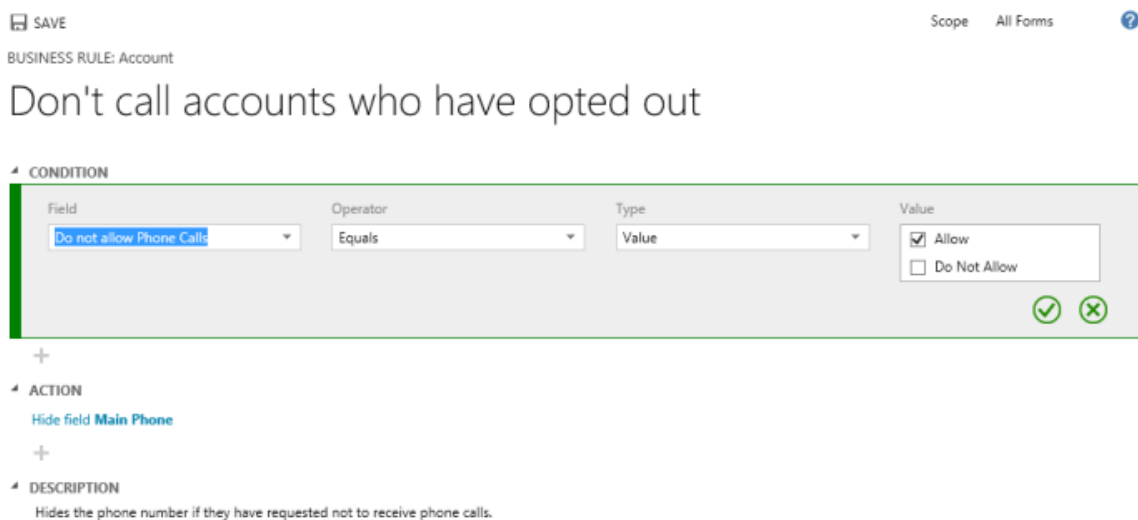
Microsoft Dynamics CRM 2013 Business Process Overview Video:

<http://bit.ly/1i73etX>

BUSINESS RULES

This great new feature is going to reduce the amount of custom code / JavaScript that needs to be authored. This speeds up deployments, reduces implementation costs and ensures the best possible experience for CRM users.

- No need for programming skills
- Hide or show fields on a form based on set conditions e.g. contact type = Member allows membership date fields to be shown
- Lock fields based on specified conditions
- Make one field mandatory based on other field values e.g. you must complete additional driver details if additional driver is Yes.
- Rules will apply across devices e.g. tablet, mobile, web



SAVE Scope All Forms ?

BUSINESS RULE: Account

Don't call accounts who have opted out

CONDITION

Field	Operator	Type	Value
Do not allow Phone Calls	Equals	Value	<input checked="" type="checkbox"/> Allow <input type="checkbox"/> Do Not Allow

+ ✓ ✕

ACTION

Hide field Main Phone

+ ✓ ✕

DESCRIPTION

Hides the phone number if they have requested not to receive phone calls.

REAL TIME WORKFLOWS

With previous versions of Dynamics CRM if you wanted to have real time code executed with the creation or update of a record you had to author and register a plug-in. This meant that quick and simple changes by non-developers, was not an option. With real time workflows all of the power of the workflow point and click interface is now available for real time processing.

ACCESS TEAMS


This is a new type of team that doesn't own records, but can be granted access to work on records. This allows a unique set of people within the organisation to easily work on a specific record.

DESKTOP, TABLET & MOBILE APPS

Configure once, use anywhere, period

You told us you want a unified platform for your customer data, not a series of one-off apps. So we've taken a different approach to mobile.

Microsoft Dynamics CRM 2013 has full-blown native capabilities for iOS and Windows 8. And you only have to configure once to get it.



With the release of Microsoft Dynamics 2013 there is a great new suite of apps to make it easier to work with CRM on the go. A new mobile application keeps salespeople connected to data, team members, and customers. With access to your CRM solution on your iPad or Windows 8 tablet, you have the tools you need to not only look smarter but also to be smarter. The new apps include:

- Mobile app for Windows Phone
- Mobile app for Android
- Mobile app for iOS (iPad and iPhone)
- Windows 8 app for a great desktop experience.

All apps provide access to limited information offline.

Microsoft Dynamics CRM Powers Sales Teams On the Go Video:

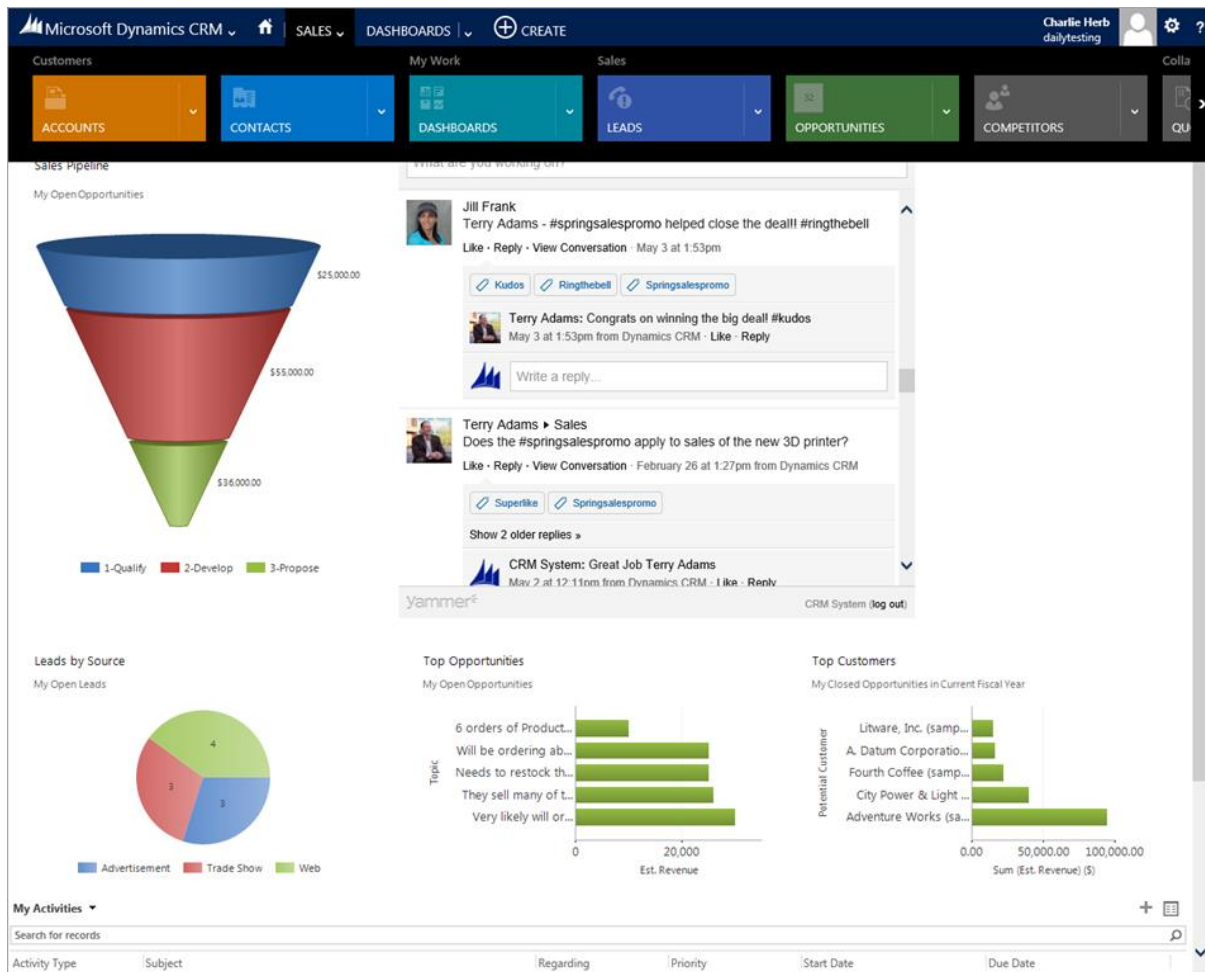
<http://bit.ly/1bvbkY1>

YAMMER, SKYPE & LYNC

Yammer, Skype and Lync have all been integrated with CRM to provide improved internal collaboration and to make it easy to contact clients directly from CRM.

Yammer when it matters

The power of Yammer in the context of your task—whether working an opportunity, executing a campaign, or resolving a case—gives you access to the people and resources you need to get things done at the speed of business.



Microsoft Dynamics + Yammer Video:

<http://bit.ly/1b0yZD9>

Social CRM

Far more than a passing trend, social is here to stay. But when it comes to applying it to your business, you may be asking, "Where do I start?" The answer is simple: start with the priorities you have for your business. Enterprise Social can help you do whatever you need to do—faster and smarter. Social capabilities help you do many things:

- Listen** - Hear what your customers are saying, uncover trends, and identify influencers.
- Engage** - Take part in meaningful conversations with your stakeholders.
- Collaborate** - Connect with people quickly and easily, and work to desired outcomes.
- Amplify** - Create broad awareness of your message.
- Solve** - Grow and harvest community knowledge; connect customers to solve problems.
- Innovate** - Take action on ideas and opportunities gleaned from the crowd.
- Analyze** - Get real-time feedback, monitor buzz, detect sentiment, and measure impact.

INTEGRATED MAPS

Bing Maps has been closely integrated with Microsoft Dynamics CRM 2013, allowing for location based information to be easily available within forms.

AUTOSAVE

No more forgetting to save and losing data. CRM 2013 will now save as you go for record updates. The records will be saved every 30 seconds. If necessary this can be disabled at the organisation level or just for specific forms.

AVAILABILITY OF BROWSERS

With this release, you will have a broader choice of browsers that you can use Microsoft Dynamics CRM with including Internet Explorer, Safari and Chrome.

MARKETINGPILOT

New options for lead generation, marketing automation, customer insights, and campaign ROI tracking and tuning are now available to you! With Microsoft's acquisition of MarketingPilot, you'll have more ways to automate and measure marketing campaigns across digital and social channels, broadcast, and print. You'll gain business insights and use behavioural analysis to help you fine-tune marketing campaigns, control budgets, do precise projections, and measure the impact on revenue.

Introduction to MarketingPilot Video:

<http://bit.ly/M9CAp8>

ADDITIONAL C2 COLLATERAL & SIGNPOSTS

C2Software.com:

C2 Software Insight to Microsoft Dynamics CRM 2013:

<http://www.c2software.com/c2-blog/white-paper-dynamics-crm-2013.aspx>

C2 & Microsoft Dynamics CRM:

<http://www.c2software.com/microsoft-dynamics-crm/microsoft-dynamics-crm.aspx>

C2 Microsoft Dynamics CRM Case Studies:

<http://www.c2software.com/case-studies/c2-clients-crm-and-web.aspx?ccategory=crm>

C2 Blog & Microsoft Dynamics CRM Knowledge Articles:

<http://www.c2software.com/c2-blog/social-insights-dynamics-crm-2013.aspx>

Microsoft Resources

Microsoft Dynamics CRM Customer Centre:

<http://www.microsoft.com/en-us/dynamics/crm-customer-center/default.aspx>

Microsoft Dynamics CRM - What's New!:

Preview Guide: [Microsoft Dynamics CRM Release Preview Guide](#)

<http://rc.crm.dynamics.com/rc/2011/en-us/whatsnew.aspx>

Microsoft Dynamics eBooks:

[eBook: What's changed in this version?](#)

[eBook: Start working in CRM](#)

Microsoft Dynamics CRM Videos:

<http://community.dynamics.com/crm/b/crmvideos/default.aspx>

The Dynamic Sales Team - Transforming the way organizations sell

http://crmpublish.blob.core.windows.net/docs/Whitepaper_TheDynamicSalesTeam_20121107_web.pdf

Microsoft Dynamics CRM for the Financial Advisor:

<http://community.dynamics.com/crm/b/crmvideos/archive/2013/11/08/microsoft-dynamics-crm-for-the-financial-advisor.aspx>

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